



**To:** Workforce Development Board Directors  
WorkOne Operators  
DWD Regional Directors

**From:** Regina Ashley, Associate Chief Operations Officer for Policy  
Indiana Department of Workforce Development

**Date:** June 9, 2015

**Subject:** WIOA T1 (134)-P1  
On-the-Job Training Guidelines under the Workforce Innovation and Opportunity Act (WIOA)

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## Purpose

This policy provides guidance for on-the-job training (OJT) contracts funded by the Workforce Innovation and Opportunity Act (WIOA), Title I programs in the State of Indiana. The main changes are: 1) the possibility of an increase to a maximum of 75% reimbursement if certain criteria are documented, and 2) the use of OJT in tandem with Individual training accounts (ITAs) for registered apprenticeships.

## Rescission

DWD Policy 2014-05, On-the-Job Training Guidelines

DWD Policy 2010, Change 1, Customer Flow Policy

## References

- Workforce Innovation and Opportunity Act Section 3(44), Section 134(c)(3), Section 181(a), Section 181(b), Section 181(d), Section 194(4)
- WIOA Proposed Regulations §680.330, §§680.700-750, 80 Fed. Reg. 20855, 20860-20861 ([April 16, 2015](#))

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## Content

### *OJT Contract*

OJT is defined at WIOA Section 3(44). OJT is provided under a contract with an employer in the public, private non-profit, or private sector. Through the OJT contract, occupational training is provided for the WIOA participant in exchange for wage reimbursement for hours in training. Employers are to provide individuals in OJT with benefits and working conditions at the same level and to the same extent as other trainees or employees working a similar length of time and doing the same type of work.

- The OJT contract is to outline the respective required duties of an OJT employer and the WDB or its designee as they relate to the provision of an OJT. Each contract, at a minimum, must contain the provisions included in Attachment B (Minimum Provisions to be Included in OJT Contracts) of this policy. During negotiation of an OJT contract, the WDB or its designee should estimate the training cost for the employer; this estimation should be used as a basis for negotiating the percentage of wages that would be reimbursed to the employer during the training period. The percentage of wages reimbursed to the employer cannot exceed 50 percent. One exception is that the Governor or the WDB may increase the reimbursement amount up to 75 percent, taking into account these factors:
  - The characteristics of the participants taking into consideration whether they are “individuals with barriers to employment” (as defined in WIOA Section 3(24)); thus, your local policy may provide a higher rate of reimbursement for individuals who will require more intensive training than individuals without barriers;
  - The size of the employer, with an emphasis on small business. This means that your local policy can consider providing a higher wage reimbursement to smaller employers. You might, for example, provide a 30% reimbursement to employers of 1,000 or more; 50% for employers of 500-999; 60% for employers of 50-499; and 75% for employers of less than 50.
  - The quality of employer-provided training and advancement opportunities, for example if the OJT contract is for an in-demand occupation and will lead to an industry-recognized credential; and
  - Other factors the WDB may determine to be appropriate, which may include the number of employees participating, wage and benefit levels of the employees (both at present and after completion), and relation of the training to the competitiveness of the participant.

See WIOA 134(c)(3)(H); WIOA Proposed Regulations §680.730.

- The WDB must have a policy in place outlining the process for determining the rate of training wage reimbursement. The WDB also must document the factors used for establishing any rate over 50%.
- The duration of the training must be established as part of the OJT contract. The duration should be of sufficient length to ensure the acquisition of skills by the participant and proficiency in the occupation for which the training is being provided while not being excessive in length. The maximum duration for WIOA- funded OJT in the State of Indiana is six months. Special exceptions to the maximum duration must be approved in writing by the Associate Chief Operations Officer for Policy for the Indiana Department of Workforce Development.
- In determining the appropriate length of the contract, consideration should be given to the skill requirements of the occupation, the academic and occupational skill level of the participant, prior work experience, and the participant's academic and career plan (ACP).
- It is generally expected that the OJT contract would be a two-party contract, but in some instances, an OJT employer may utilize an employment service or other third-party human resource service to serve as the employer-of-record for new workers employed by the company. In these instances, the WDB or its designee may utilize three-party contracts, which specifically delineate the responsibilities of each party. In instances involving three-party contracts, both the OJT employer and the employer-of-record must abide by the governing provisions contained within this policy.

#### ***OJT and Eligible Employed Workers***

OJT contract may be written for an eligible employed worker when the additional below requirements are met:

- 1) The employee is not earning a self-sufficient wage (as determined by local policy); and
- 2) The OJT relates to the introduction of new technologies, introduction to new production or service procedures, upgrading to new jobs that require additional skills, workplace literacy, or other appropriate purposes as defined in local policies.

#### ***OJT and Registered Apprenticeship Programs***

Individual training accounts (ITAs) and OJT funds may be combined to support placing participants into a registered apprenticeship program, just as they can be used together for a participant who is not in a registered apprenticeship. Local WDBs set policy for ITA duration and financial limits.

- An ITA may be used to support the classroom portions of the apprenticeship program, and OJT funds may be used to support the on-the-job training portions of the program.
- Depending on the length of the registered apprenticeship and local OJT policies, these funds may cover some or all of the registered apprenticeship training.

- If the apprentice is employed at time of participation, the additional criteria set forth above must be met.

### *Limitations*

- OJT contracts may not be established with employers that have previously exhibited a pattern of failing to provide OJT participants with continued long-term employment with wages, benefits including health benefits), and working conditions that are equal to those provided to regular employees that have worked a similar length of time and are doing the same type of work.
- Funds may not be used to reimburse OJT employers for any overtime hours worked by the OJT participant. Overtime hours are generally needed for increased production demands and are rarely needed to provide additional training to participants.
- WIOA funds may not be used or proposed to be used for the encouragement or inducement of a business, or part of a business, to relocate from any location in the United States, if the relocation results in any employee losing his or her job at the original location.
- WIOA funds may not be used to provide OJT if the business has relocated from any location in the United States and the relocation resulted in any employee losing his or her job at the original location. This prohibition is no longer applicable after the company has operated at the new location for 120 days. To verify that an establishment (which is new or expanding) is not, in fact, relocating employment from another area:
  - A standardized pre-award review must be completed and documented jointly by the WDB or its designee and the OJT employer as a prerequisite to WIOA assistance.
  - The review must include names under which the establishment does business, including predecessors and successors in interest; the name, title, and address of the company official certifying the information; and, whether WIOA assistance is sought in connection with past or impending job losses at other facilities, including a review of whether WARN notices relating to the employer have been filed.
  - The review may include consultations with labor organizations and others in the affected region or local area(s). See Attachment A for details.
- Funds provided to employers for OJT must not be used to directly or indirectly assist, promote or deter union organizing.
- A participant may not be employed or assigned to an OJT if:
  - Any other individual is currently on layoff from the same or any substantially equivalent job;
  - The employer has terminated the employment of any regular employee or caused an

- involuntary reduction in its workforce with the intention of filling the vacancy with OJT participants; or
  - The OJT position is created in a promotional line that infringes in any way on the promotional opportunities of currently employed workers.
- An OJT must be in an in-demand industry or for an occupation in-demand that is included on the State list of targeted economic sectors, as defined by the Indiana Career Council through the sector resolution, in partnership with DWD, employers, IEDC, and WDBs. In-demand sectors and occupations will be facilitated and reviewed at least annually at both a state-wide and regional level by the Department of Workforce Development in partnership with local WDBs.
- OJT funds can only be used to pay for training for positions that pay a minimum of \$10 per hour, or \$20,800 annually for Adult or Dislocated Worker, Out of School Youth, or In-School youth who have graduated. Special exceptions to this guideline must be approved in writing by the Associate Chief Operations Officer for Policy for the Indiana Department of Workforce Development.
- The expenditure on an individual OJT contract is limited to \$13,000 annually.
- Participants may only be provided OJT one time in any twelve month period. The only exception is when an OJT participant has successfully completed the training and was subsequently laid off through no fault of his/her own.
- All OJT participants must first pass a drug screen test consistent with state policy [WIOA T1 (181)-P1].

## **Effective Date**

July 1, 2015

## **Ending Date**

Upon rescission

## **Contact for Questions**

[policy@dwd.in.gov](mailto:policy@dwd.in.gov)

## **Action**

WDBs should ensure that the guidance contained within this policy is followed when implementing and operating on-the-job training programs that utilize WIOA funding. WDBs must establish criteria for the amount of reimbursement in a local policy that is available for review. For any amount approved beyond 50 percent up to 75 percent, WDBs must have documentation of the factors used in making the decision.

### *On-the-Job Training Process*

1. WorkOne staff works with the employer to complete the pre-award review (Attachment A). The WDB, or its designee, is responsible for validating information provided in the pre- award review during the mandatory on-site monitoring visit.
2. WorkOne staff works with employer to determine the number of workers needed by the employer, the skills, experience, and other job requirements usually required for the job opening. Staff should utilize tools, such as Specific Vocational Preparation and O\*Net, to determine the normal duration of training that is required for that job classification. Additional guidance on determining the appropriate duration of an OJT is contained in Attachment D.
3. WorkOne staff ensures that job openings to be considered for OJT participants are listed on the State's Job Match System -Indiana Career Connect.
4. WorkOne staff works with the OJT employer to recruit and select OJT participants for the specific openings. Ultimate hiring determinations must be made by the OJT employer.
5. WorkOne staff works with the employer and participants to determine skill gaps and the training plan for selected participants. Each participant must have an individual training plan that must be documented in case notes of the State's electronic case management system. A sample training plan is included in Attachment C.
6. WorkOne staff establishes OJT contract(s) with the OJT employer for each individual participant.
7. When the employer hires the new worker, the OJT officially begins. An OJT for an employed worker officially begins when training that was outlined in the OJT agreement begins. Service records must indicate start date of the OJT.
8. Employers are to provide regularly scheduled invoices to WDBs, or its designee, for reimbursement.
9. The WDB, or its designee, conducts monitoring of OJT contracts and follow-up with OJT participants. Monitoring of OJT contracts and follow-up with OJT participants must be documented in service records.
10. Employer electronic signatures on OJT forms are authorized in accordance with IC 26-2-8 "Uniform Electronic Transaction Act".

### *Monitoring and Follow-Up Requirements*

WDBs have proactive responsibilities to monitor the successful operation of OJT contracts. WDBs or their designees are to conduct periodic check-ins with OJT companies and conduct at least one fully documented monitoring visit during the OJT contract. The primary purpose of these check-ins and the monitoring visits is to ensure that the OJT employer is following all specifications included in the OJT

contract and that the OJT participant is making satisfactory progression through his or her training plan. A sample OJT Monitoring Template is included in Attachment E.

Additionally, WDBs or their designees are to provide meaningful follow-up services to OJT participants. WorkOne staff persons are to conduct periodic check-ins with OJT participants throughout the duration of their training and for six months following successful completion of the OJT. These check-ins will help to determine if the participant is in need of additional WorkOne services to successfully retain his/her employment. All check-ins should be documented in the State's electronic case management system as a follow-up service.

## **Attachments**

Attachment A: Sample OJT Pre-Award Review Form

Attachment B: Minimum Provisions to be Included in OJT Contracts and Sample OJT Contract Agreement

Attachment C: OJT Plans Guidance

Attachment D: Determining the Appropriate Duration of an OJT

Attachment E: Sample OJT Monitoring Template

**Attachment A**  
**SAMPLE On-the-Job Training Pre-Award Review Form**

**I. Identifying Information:**

Company\_\_\_\_\_

Address\_\_\_\_\_

City/State/Zip\_\_\_\_\_

Company\_\_\_\_\_

Official – Name and Title

Phone\_\_\_\_\_

Other names (including successor(s) in interest) under which the above company has conducted or is currently conducting business\_\_\_\_\_

\_\_\_\_\_

**II. Relocation Information:**

Has the above company, any subsidiary, affiliates, or part thereof, relocated within the last 120 days?

Yes\_\_\_\_\_ No\_\_\_\_\_

If yes, please indicate the date in which operations began at the new facility. \_\_\_\_\_

If the establishment relocated within the last 120 days, did the move result in a loss of employment for any employee of the company at the original location?

Yes\_\_\_\_\_ No\_\_\_\_\_ Not applicable, did not relocate\_\_\_\_\_

**III. Current Employee Status:**

Are any employees currently on layoff from the same job classification(s) that will be included in the on-the-job training program?

Yes\_\_\_\_\_ No\_\_\_\_\_

If yes, have the employees been laid off for a minimum of 120 days or declined an offer to return to work? Yes\_\_\_\_\_ No\_\_\_\_\_



#### **IV. Labor Consultation**

Are the positions that are part of the on-the-job training program subject to a collective bargaining agreement?    Yes\_\_\_\_\_    No\_\_\_\_\_

If yes, provide a listing of all unions and contact information:

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#### **V. Attestation and Validation:**

The company official hereby attests, under penalty of perjury, that the above information is correct.

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Signature of Company Official

Date

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WorkOne Representative/Title

Date

**Attachment B**  
**Minimum Provisions to be Included in On-the-Job Training Contracts**

WDBs must ensure that the following provisions are included in OJT contracts established with employers:

- Identification of the parties involved in the contract.
- The beginning and ending dates of the contract.
- The total training hours.
- The rate of reimbursement and the total reimbursement, including the wage rate for the WIOA participant.
- A copy of the participant's OJT Training Plan.
- Requirements for trainee retention.
- Assurances of safe working conditions.
- Assurances from employer of compliance with all Federal, State, and local regulations, including WIOA.
- Assurances from employer that include specific references to fair labor standards, benefits, non-discrimination, non-sectarianism, lobbying restrictions, and policy activity restrictions.
- Audit rights and access to records.
- Record retention requirements.
- Default clauses for non-performance and convenience.
- Modification methodology.
- Payment and delivery terms (for OJT, time/attendance records must be maintained).

The above items are not an all-inclusive list, but serve as an initial guideline. Furthermore, these points are not intended to replace or supersede mandates and guidelines in Federal and State laws and regulations regarding procurement and contracting.

## SAMPLE On-the-Job Training Contract Agreement

Effective Date of Contract: \_\_\_\_\_ Contract Number: \_\_\_\_\_

### I. PARTIES TO THIS AGREEMENT

#### WORKFORCE DEVELOPMENT ENTITY

Address  
City, State, Zip  
Contact Person  
Phone Number

#### EMPLOYER NAME

Employer Address  
City, State, Zip  
Contact Person  
Phone Number

### II. CONDITIONS OF THIS AGREEMENT

- A. **Reimbursement Process:** In consideration for the training provided, (WORKFORCE DEVELOPMENT ENTITY), agrees to reimburse the Employer XX% of the wages paid to the identified WorkOne customer (trainee) to an amount not to exceed the OJT contract total.

Trainee Name: \_\_\_\_\_

Trainee SS#: XXX-XX- \_ \_ \_ \_

Trainee Job Title: \_\_\_\_\_

Trainee Hourly Wage: \_\_\_\_\_

Trainee Start Date: \_\_\_\_\_

Trainee End Date: \_\_\_\_\_

Total Number of OJT Hours: \_\_\_\_\_

OJT Contract Total: \_\_\_\_\_

This XX% wage reimbursement is in compensation for the costs associated with training the identified individual and the trainee's lower productivity during the identified training period. The individual's training plan is included as Attachment (X) to this agreement. Reimbursement will occur as a result of invoices submitted by the Employer. Overtime wages, wage increases not specified in this contract, and hours in excess of those specified in this contract will not be reimbursed. Further, reimbursement will not be made for time in which the trainee is absent from training, including authorized paid absences such as holidays, sick days, and vacation days. (WORKFORCE DEVELOPMENT ENTITY) will not reimburse contributions to retirement, medical or any other benefit plans for the trainee.

- B. **Trainee Retention:** Just as the Employer has the right to hire the trainee, termination for just cause rests with the Employer. However, as part of this agreement, the Employer agrees that the trainee will not be terminated without prior notice and reasonable opportunity for correction or improvement of performance. As a part of this assurance,

the Employer will immediately notify (WORKFORCE DEVELOPMENT ENTITY) if the trainee has an attendance or disciplinary problem or has demonstrated an inability to perform in accordance with the training plan. The Employer also agrees to retain the trainee as a regular employee upon successful completion of the training.

**C. Trainee Wages, Benefits and Working Conditions:** The following will govern the wage rates, benefits, and overall working conditions for the trainee.

1. Trainee wages will be equal to the wage rate paid by the Employer to other similar employees.
2. The trainee will be afforded the same benefits and working conditions as any other employee doing the same type of work for a similar length of time.
3. The Employer will provide Workers Compensation benefits in accordance with State law, or, when such law is not applicable, liability insurance coverage for injuries suffered by the trainee.
4. The trainee will not be required to work in conditions which are unsanitary, hazardous, or dangerous to his or her health or safety. With inherently dangerous jobs, reasonable safety practices will be applied. In the event that the trainee is subject to child labor laws in any form, the Employer agrees to follow all such laws.

**E. Employer Assurances**

1. The Employer assures that it will comply with all Federal, State and local regulations, rules, laws and policies that govern the use of Workforce Innovation and Opportunity Act (WIOA). In the event that such regulations, rules, laws, or policies would change, the Employer assures it will comply with these changes as they apply to this on-the-job training contract.
2. The Employer assures that no currently employed workers will be displaced by the trainee or suffer a reduction (or partial reduction) in wages, benefits, or work hours, including overtime work hours. The Employer also assures that the trainee is not filling a position which will infringe upon the promotional opportunities of current employees.
3. The Employer assures that the trainee will not fill a position when:
  - another employee is currently on layoff from the same or an equivalent job, or
  - the Employer has terminated a regular employee with the intention of filling the opening with the trainee, or
  - another employee is not employed because of a labor dispute.
5. The Employer assures that this contract will not impair any existing collective bargaining agreements and that it will obtain written concurrence of the appropriate labor organization if inconsistencies with the bargaining agreement exist. It is further assured that the Employer will notify (WORKFORCE DEVELOPMENT ENTITY) if a labor dispute occurs during the term of this contract.
6. The Employer assures that no job training funds will be used to assist, promote, or deter union organizing. The Employer further assures that the trainee will not be employed in a job that involves political or lobbying activities.
7. The Employer assures that the trainee will not be employed and funds received under this contract will not be used to conduct or support the construction, operation, or maintenance of any facility used for religious instruction or worship.
8. The Employer assures that the trainee hired under this agreement will not be the immediate relative of the Employer's administrative or supervisory staff.

9. The Employer assures that it has written personnel policies and that these policies will be reviewed with the trainee.
10. The Employer agrees to make every reasonable effort to maintain a drug-free workplace as required by the Drug-Free Workplace regulatory requirements specified in the Drug-Free Workplace Act of 1988.
11. As a condition to the award of financial assistance through (WORKFORCE DEVELOPMENT ENTITY), it is assured, with respect to the operation of the WIOA funded program or activity and all agreements or arrangements to carry out the WIOA funded program or activity, that the Employer will comply fully with the nondiscrimination and equal opportunity provisions of WIOA; Title VI of the Civil Rights Act of 1964, as amended; Section 504 of the Rehabilitation Act of 1973, as amended; the Age Discrimination Act of 1975, as amended; Title IX of the Education Amendments of 1972, as amended; and with all applicable requirements imposed by or pursuant to regulations implementing these laws. The United States has the right to seek judicial enforcement of this assurance.
13. The Employer assures that it has not relocated causing the displacement of employees from any other location. The Employer also assures that funds provided under this contract have not caused a loss of employment for any employee at this or any other Employer location.
14. The Employer assures (WORKFORCE DEVELOPMENT ENTITY) that it has not received payment for these on-the-job training activities from any other state or federal source.

#### **F. Contract Management**

1. The Employer agrees that (WORKFORCE DEVELOPMENT ENTITY) staff, and State or Federal officials may visit the worksite for the purposes of reviewing the progress of the trainee.
2. All personnel and payroll records pertaining to the trainee must be kept for three years. State and Federal officials must be granted access to these records if requested for audit purposes. (WORKFORCE DEVELOPMENT ENTITY) staff must have access to these records at least once during the training period to verify the accuracy of invoices.
3. This contract may be modified if both parties agree, in writing, to the modification. This contract may also be terminated at any time by either (WORKFORCE DEVELOPMENT ENTITY) or the Employer with written notice explaining the reasons for and effective date of the termination. (WORKFORCE DEVELOPMENT ENTITY) reserves the right to terminate this agreement subject to the availability of funding.

### **III. COMMITMENT TO THIS AGREEMENT**

(WORKFORCE DEVELOPMENT ENTITY) and the Employer each represent that it has full and complete authority to enter into this contract and that the individual signing this contract has been duly authorized to execute such contracts. Upon signature, this agreement is a valid, binding, and enforceable agreement.

**FOR (WORKFORCE DEVELOPMENT ENTITY):**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Typed Name

\_\_\_\_\_  
Title

**FOR THE EMPLOYER:**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Typed Name

\_\_\_\_\_  
Title

### **Attachment C**

#### **On-the-Job Training Plans Guidance**

Many OJT plans simply contain a job description taken verbatim from the O\*NET and broken down by job components with a projected training time for each component. Such an approach does not convey the message that training is being conducted, i.e., skills are being taught and skills are being learned.

- Training activities must be described clearly to show that the employer is obligated to conduct training.
- Skills to be learned should be separately listed with training times estimated for each.
- Training times must be reasonable.
- Training times must be geared to both the complexity of the job and the abilities of the trainee.
- The training plan must identify the job title of the person(s) responsible for the training.
- The training plan must be monitorable. The WIA participant, supervisor, and/or trainer should be knowledgeable about its contents.

#### **Sample OJT Training Plan**

Automotive Technician: (O\*NET Code) front-end mechanic (automobile service); alignment mechanic; axle-and-frame mechanic; chassis mechanic; wheel alignment mechanic

Job Description: Aligns wheels, axles, frames, torsion bars, and steering mechanism of automotive vehicles, such as automobiles, buses, and trucks. Drives vehicle onto wheel alignment rack. Tests for bent axle, worn ball joints, and bent steering rods, using alignment testing machine. Straightens axle and steering rods and adjusts shims, tie rods, and joining pins to align wheels, or installs new parts, using hand tools. Places wheel on balancing machine to determine where counterweights must be added to balance wheel. Hammers counterweights onto rim of wheel. Installs shock absorbers. Strengthens frame using hydraulic jack, chassis aligner, and acetylene torch.

#### Training Outline:

1. Learn to operate wheel alignment machines. Develop skills required to measure, caster, camber, toe-in, toe-out, king pin inclination at requisite levels of precision for various types of systems used on contemporary passenger cars, i.e., double wish bone coil suspension systems, McPherson strut system, torsion bar system, etc.

Trainer: Assigned Lead Worker

Hours: 160

Performance Measurement: Demonstration of skills required to operate equipment and tools used to align front-end components according to specifications.

2. Instruction in the disassembly and assembly of component parts of various front-end systems noted in item #1. Learn to remove and replace springs, shocks, ball joints, king pins, struts, steering rods, steering arms, idler arms, etc. Become thoroughly familiar in the operation of power tools and hydraulic equipment used in the above operations.

Trainer: Assigned Lead Worker

Hours: 200

Performance Measurement: Demonstration of ability to remove and replace springs, shocks, ball joints, king pins, struts, etc. using power tools and hydraulic equipment.

3. Learn to operate with required skills, equipment used to remove and replace tires from wheels. Learn to operate various items of equipment to balance wheels on and off vehicles, static and dynamically, using computerized balancing equipment.

Trainer: Assigned Lead Worker

Hours: 80

Performance Measurement: Demonstration of skills required to operate tire changing and wheel balancing equipment.

TOTAL HOURS: 440

**Attachment D**  
**Determining the Appropriate Duration of an OJT**

To ensure that the duration of the OJT is appropriate, Specific Vocational Preparation (SVP) codes associated with various occupational coding systems (i.e., DOT, OES, SOC, or the Occupational Units of the O\*Net system) should be utilized. The SVP code for an occupation is the amount of lapsed time required by a typical worker to learn the techniques, acquire the information, and develop the facility needed for average performance in a specific job-worker situation. SVP codes range from 1 – 9 levels. Each level suggests an appropriate duration for training as shown:

<b>SVP Level</b>	
1	Short demonstration only
2	Anything beyond short demonstration up to and including 1 month
3	Over 1 month up to and including 3 months
4	Over 3 months up to and including 6 months
5	Over 6 months up to and including 1 year
6	Over 1 year up to and including 2 years
7	Over 2 years up to and including 4 years
8	Over 4 years up to and including 10 years
9	Over 10 years

SVP codes for various occupational coding systems may be obtained through DOL's O\*Net web site at <http://online.onetcenter.org/> by clicking on "OnLine Help." Note that the duration of training suggested by the SVP for a given occupation is only a starting point for negotiations with an employer. In determining the specific duration for a specific contract, consideration should be given to the skill requirements of the occupation, the academic and occupational skill level of the participant, prior work experience, and the participant's individual employment plan.



**Attachment E**  
**SAMPLE OJT Monitoring Template**

Employer Name: \_\_\_\_\_

OJT Contract#: \_\_\_\_\_

OJT Participant Name: \_\_\_\_\_

OJT Participant SSN: XXX-XX- \_\_\_\_\_

Monitor's Name: \_\_\_\_\_

Date of Visit: \_\_\_\_\_

**Records and Accounts**

Question	Answer	Findings/Issues (if any)
1. Does the employer have timesheets or payroll registers for the OJT participant and do these documents support the hours claimed on the most recent invoice?	Yes  No	
2. Is the OJT participant receiving the wage identified in the OJT contract and on the most recent invoice?	Yes  No	
3. Is the OJT participant receiving the same wage as other workers in the same position?	Yes  No	

**Training Activities**

Question	Answer	Findings/Issues (if any)
4. Is the OJT participant receiving the training that was detailed in the OJT Training Plan?	Yes  No	
5. Is the OJT participant working and receiving training in a safe and healthy work environment?	Yes  No	

Is the OJT participant receiving appropriate direction and supervision on the worksite?	Yes	
	No	

**OJT Progress Check**

Question	Answer	Findings/Issues (if any)
6. From the OJT participant's perspective, do they feel they are doing well and learning the required job tasks?	Yes	
	No	
7. From the employer's perspective, do they feel that the OJT participant is doing well and learning the required job tasks?	Yes	
	No	
8. Are there any issues which may cause this OJT to be unsuccessful?	Yes	
	No	

**Overall Evaluation**

Briefly describe what was observed and learned while conducting the OJT monitoring visit.

Detail any needed corrective actions to address the findings and issues identified in the above questions.

Monitor's Signature: \_\_\_\_\_

Date of Signature: \_\_\_\_\_

Date of Follow-Up Visit if Needed: \_\_\_\_\_